Legal Notice

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Abstract

This document discloses a novel concept titled *"System and Method for Dynamic Lead Acquisition and Professional Compliance Management in a Service Marketplace"* intended to serve as prior art under U.S. and international patent law. The invention described herein is made publicly available to prevent others from obtaining patent rights on the same or substantially similar technology.

Technical Disclosure

Field of the Invention: The present invention relates generally to online service marketplaces, and more specifically to systems and methods for efficiently matching service requests (leads) with qualified service professionals, managing dynamic lead acquisition models, and ensuring professional compliance through multi-faceted vetting processes.

Background / Problem Solved: Traditional service marketplaces often suffer from inefficiencies in lead distribution, sub-optimal revenue generation, and inadequate professional vetting. Professionals may be deterred by overly competitive bidding or unclear lead acquisition costs, while platforms struggle to maximize lead value and ensure a high standard of service provider quality and compliance. There is a need for a system that intelligently blends competitive and predictable lead acquisition methods, dynamically manages lead inventory, and implements a robust, multi-layered compliance and trust scoring mechanism.

Summary of Key Potentially Patentable Features (USA Focus):

A. Novel Dynamic Lead Acquisition & Distribution System:

- **Core Concept:** A system for distributing service leads (Tasks) to qualified professionals that dynamically combines an initial competitive bidding (auction) phase with a subsequent fixed-price invitation (click-per-bid) phase for unfilled lead slots.

4. Detailed Description

- **Mechanism (The "How"):**

1. **Lead Creation & Initial Auction:** Property owners submit service requests, which become "Tasks." These Tasks are made available for a fixed number of top-tier professionals (e.g., 5) to acquire through an auction-style bidding process. Professionals submit bids (`Bid` entity)

based on `ServicePricing.minimum_bid` or their `ProfessionalBidSetting.custom_shared_bid`.

2. **Auction Outcome Evaluation:** After a defined auction period, the system evaluates the number of professionals who successfully acquired a lead spot through competitive bidding (e.g., top 5 highest bids).

3. **Intelligent Spot Filling (Click-Per-Bid Invitation Trigger):** If fewer than the maximum number of desired professionals (e.g., 5) are secured through the auction phase, the system identifies the remaining unfilled slots.

4. **Targeted Fixed-Price Invitations:**
   For each unfilled slot, the system automatically sends an invitation to qualified professionals (based on `User.lead_acquisition_click_per_bid` preference and service/location matching) to acquire the lead at a pre-defined fixed price. This fixed price is dynamically determined by the `Service.minimum_bid` associated with the specific service of the lead.

5. **Professional Preference Integration:**
   Professionals explicitly opt-in via a modal to participate in "Bidding," "Click-Per-Bid," or both (`User.lead_acquisition_bidding`, `User.lead_acquisition_click_per_bid`). The system utilizes these preferences to send appropriate notifications and offers.

6. **Revenue Maximization & Fairness:** This approach ensures maximum revenue extraction from high-demand leads (auction) and fills inventory gaps from lower-demand leads (click-per-bid), without disadvantaging auction participants who had priority.

7. **Deferred Payment Trigger:** Payment for both auction wins and click-per-bid acquisitions is triggered only *after* the bid closing period, and winners are declared and assigned (`functions/processLeadWinners.js`).

Multi-Faceted Professional Compliance & Trust Scoring System:

- **Core Concept:** A comprehensive, automated, and human-assisted system for evaluating, scoring, and tiering service professionals based on dynamic compliance requirements and AI-driven trust assessments.

- **Mechanism (The "How"):**

1. **Tiered Compliance Framework:**
   Professionals progress through defined tiers (e.g., Unverified, Copper, Silver, Gold, Emerald) based on meeting progressively stricter compliance requirements, as defined by `UserCompliance` and dynamically configured SiteSettings.

2. **Dynamic Compliance Requirements:** The system manages various compliance checks (e.g., `UserCompliance.insurance`, `UserCompliance.business_license`, `UserCompliance.background_check`, `UserCompliance.safety_awareness`). New types of checks can be added and managed via SiteSettings.

3. **AI-Driven Lead Trust Score (`Task.trust_score`):**
   • Automated real-time analysis of incoming leads using an LLM (`functions/vetLead.js`) to assess multiple factors (`Task.ip_geo_match_status`, `Task.rate_limit_status`, `Task.llm_text_analysis_status`, etc.).

   • Identification of potential fraud indicators (`Task.llm_flagged_reasons`, `Task.suspicious_keywords_check`, `Task.unusual_patterns_check`).

   • Generation of a consolidated `Task.overall_vetting_score` (e.g., "high_risk", "low_risk").

   • This score influences lead visibility and professional qualification.

4. **Admin Review & Override:**
   A dedicated `ComplianceReview` interface (`components/admin/ComplianceReview.jsx`) allows administrators to manually review flagged items, compliance data, and vetting summaries, with the ability to manually override AI assessments (`Task.admin_override_flag`). An email templating system facilitates communication with professionals regarding compliance issues (`components/admin/EmailManager.jsx`).

5. **Dynamic Service Listing Fees based on Tier:** The system applies different `SERVICE_LIMIT`s and `SERVICE_OVERAGE` costs based on a professional's current `compliance_tier`, including a `BULK_DISCOUNT` for high-volume listings, all configurable via `SiteSettings`.

C. Progressive Territory Pricing System (for Partners):

• **Core Concept:**
A method for incentivizing partners to license multiple geographic territories (ZIP codes) by offering progressive discounts on setup fees within a single purchase bundle.

• **Mechanism (The "How"):**

1. **Tiered Setup Fee Rates:**
`SiteSettings` define specific setup fee rates (`TERRITORY_SETUP_FEE_BASE`, `TERRITORY_SETUP_FEE_2ND`, `TERRITORY_SETUP_FEE_3RD`, `TERRITORY_SETUP_FEE_4TH_PLUS`) for sequentially added ZIP codes within the *same transaction*.

2. **Bundle-Specific Calculation:**

   When a partner licenses a bundle of N ZIP codes, the system calculates the setup fee for each ZIP code using its corresponding progressive rate, rather than applying a flat rate.

3. **Lock-in & Restart:**

Once a bundle is paid for, the territories are "locked," and any subsequent territory purchases (new bundles) restart the progressive pricing formula.

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